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L19: Entry 1 of 1

File: USPT

Jun 17, 1997

US-PAT-NO: 5640577

DOCUMENT-IDENTIFIER: US 5640577 A

TITLE: Data processing system with automated at least partial forms completion

DATE-ISSUED: June 17, 1997

INVENTOR-INFORMATION:

| NAME | CITY | STATE | ZIP CODE | COUNTRY |
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| Scharmer; Andrew J. | Tewksbury | MA | | |

ASSIGNEE-INFORMATION:

| NAME | CITY | STATE | ZIP CODE | COUNTRY | TYPE CODE |
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APPL-NO: 08/ 517803 [PALM]

DATE FILED: August 22, 1995

PARENT-CASE:

This application is a continuation of application Ser. No. 07/816,018, filed Dec. 30, 1991, and now abandoned.

INT-CL: [06] G06 F 17/30

US-CL-ISSUED: 395/768; 395/347, 395/615, 395/769

US-CL-CURRENT: 715/507; 345/808

FIELD-OF-SEARCH: 395/145, 395/148, 395/149, 395/600, 395/347, 395/615, 395/768, 395/769

PRIOR-ART-DISCLOSED:**U.S. PATENT DOCUMENTS**
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| PAT-NO | ISSUE-DATE | PATENTEE-NAME | US-CL |
|----------------|---------------|------------------|---------|
| <u>4553206</u> | November 1985 | Smutek et al. | 395/275 |
| <u>4763356</u> | August 1988 | Day, Jr. et al. | 395/149 |
| <u>4829294</u> | May 1989 | Iwami et al. | 395/146 |
| <u>4962475</u> | October 1990 | Hernandez et al. | 395/146 |
| <u>5251291</u> | October 1993 | Malcolm | 395/146 |

ART-UNIT: 237

PRIMARY-EXAMINER: Loomis; John C.

ATTY-AGENT-FIRM: Bourque; Daniel J. Carroll; Kevin J.

ABSTRACT:

A data processing system including automated forms generation uses data displayed at a predetermined position on a data terminal display screen and a data processing function selector, to automatically retrieve a pre-established form stored in a data processing system. In one embodiment, the form includes a number of uncompleted fields. The data processing system retrieves at least one datum from at least one data field displayed on the screen, and automatically inserts the data in a predetermined uncompleted field of the form. The partially or fully completed form is then stored for later retrieval, updating and printing by the data processing system.

21 Claims, 9 Drawing figures

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DATE ISSUED (1):
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Brief Summary Text (4):

Such an operation relies heavily on forms and letters and in some cases, up to several dozen forms may have to be filled out. Such forms may include initial customer set-up check lists, customer, merchant and law enforcement follow-up forms, and even Western Union mailgrams to be sent to a customer.

Brief Summary Text (10):

Accordingly, the present invention provides the user of a data processing system with forms or other documents which are automatically at least partially completed or filled in with data presented on an operator's data terminal screen.

Additionally, the present invention provides the capability of temporarily storing or saving a partially completed or fully completed form or document ("live form") for later retrieval. A partially completed form or document may be retrieved at a later time by the same operator which initially completed the form or by a different operator, and further merged with data from a second or subsequent operator data terminal screen to more fully or completely fill out the form or document.

Subsequently, the completed form or document may be stored on-line for future use and printing as required.